So, You Want to be a Consultant?

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Originally published on stickyminds.com April 2, 2010.

Hi Ben,

Here's some follow-up on our quick conversation yesterday. You asked what I thought you should do next to prepare yourself to be a consultant.

Did you notice how you asked the question? You began by saying, "I want to be a consultant like X." I've since wondered what you were thinking. Do you know what kind of consultant X is? Do you know what kind of consultant you want to be?

I don't mean *what* you want to consult about, though that's obviously basic. But it's essential to know *how* you want to conduct yourself as a consultant in relation to your clients. How do you see yourself in a consulting role? What kinds of organizations and people do you want to work with? Do you want to help your clients or influence them— and do you see any difference? What kind of help do you want to offer? What kind of influence do you want to have?

In my experience, there are two principal types of consultants. At one end of the spectrum is the group that is primarily prescriptive. These are the consultants who come in with a set of preconceived answers and ideas about the right way to do things. The big consulting firms tend to be like this, with a belief in industry best practices and packaged intellectual property intended to implement them. So do some well-known individual consultants who identify themselves with particular methods.

At the other end is the consultant who comes in knowing how to approach problems, but has an open mind about what the particular issues and solutions might be for a client. This is my preferred style of consulting. I may well have ideas about the best way to do lots of things, but I try to put the customer's needs first. Quite often, the customer knows the best solution for them, and it might not fit with my views about how testing (or software development, or management, or anything else) should be done. I try to understand their context and the reasons for their established practices, and I try to see what's valuable about what they are already doing. I also work to open them up to other possibilities, but as much as possible, I collaborate with them. I ask a lot of questions and listen to the answers. I try to learn and talk their language, rather than trying to get them to talk mine.

I have pretty strong views on consulting. I think empathy with the customer is central to effective consulting, and I don't look down on customers because they don't think about things the way I do. After all, I learn from them, too. (Although, if there's a major disconnect, I might decide they'd be happier with a different consultant.)

But, although it's foreign to me, the prescriptive consulting model is legitimate, too—and it's what a lot of clients prefer. Many organizations feel more comfortable with a

consultant who can give immediate answers and help them implement "best practices." Or they choose a consultant who is known for promoting a particular methodology.

So where do you want to be on that consulting style spectrum? The answer will shape your eventual consulting practice and your customer base. If you want to be at the prescriptive end, then you'll probably end up working mostly with clients who already think the way you do. If you want to be more open, then you'll have more opportunities to work with a broader range of customers, and possibly have a really positive influence on people you might not otherwise reach.

I've talked about the advantages of working for a consulting firm. It's only one of many ways to begin a consulting career, though, as it was my path, it's the one I'm best qualified to talk about. If you don't already know your preferred consulting style, this can be an opportunity to explore the spectrum. You will see examples of behavior that you want to emulate in your own practice and also of behavior you want to avoid.

A consulting firm will teach you how to act like a consultant (and how not), and various other skills that will be useful to you later in your own business, including: how to write a proposal (and how not), how to sell—yourself and your services, how to write a professional consulting report that will engage management attention, and how to start a gig and how to wrap one up. You will have frequent interviews with potential clients, and probably become very good at them. It will be a course in a different kind of professionalism from that appropriate to an employee.

A less obvious benefit is the opportunity to try out the consultant's lifestyle in a relatively safe environment. In my first consulting company, the branch manager had a saying: "If you're still here in three years, you're a consultant." That was because about two-thirds of our new hires bailed out in the first three years, often shortly after their first project. Even on delivery projects, consultants have to be prepared to go somewhere new every few months, perhaps every few weeks. Not everyone has the stomach for constant change and uncertainty. Consultants need to be comfortable with never knowing where they're going to be working next, what they're going to be doing, with what technology, and with whom. They also need to be philosophical about not always being allowed to finish a job. Better to try out your comfort level with those things when someone is paying you a regular salary than when you're on your own and also worrying about whether you're going to eat next week!

Large firms will give you access to larger client organizations and projects, but are typically prescriptive—important to keep in mind if that's not where you want to go. Small firms may give you more scope to try out different roles. But large or small, if you decide to join a consulting firm, I recommend starting in their delivery practice rather than the consulting practice. This would mean working on software delivery projects at client sites. It would give you a really wide experience of a variety of companies and industries and an on-the-ground feeling for how they do software development and testing. It would help you understand their points of view—what matters to their businesses, how they think about risk, etc. Over time, you would build a well of experience from which to draw later as a consultant. And you'd probably also have opportunities to take on consulting projects with people from the firm's consulting practice guiding you.

Of course, there are also books you should read. Jerry Weinberg's *Secrets of Consulting* [1] and *More Secrets* [2] top my list. Peter Block's books are also excellent; you could start with *Flawless Consulting.* [3]

Whew! This is getting long. There's lots more to talk about, but I think I've at least covered the basics.

Most importantly Ben, picture yourself ten or twenty years from now. Who is the consultant you want to be?

Best regards,

Fiona

References

[1] Weinberg, Gerald M. *The Secrets of Consulting: A Guide to Giving & Getting Advice Successfully.* Dorset House, New York, 1985.

[2] Weinberg, Gerald M. *More Secrets of Consulting: The Consultant's Tool Kit.* Dorset House, New York, 2002.

[3] Block, Peter. *Flawless Consulting: A Guide to Getting Your Expertise Used.* Pfeiffer, John Wiley & Sons, Inc., New York, 1981, 2000.